T O U R I S M

BRITISH COLUMBIA - UNITED STATES MARKET MATCH SURVEY

RESORT VACATIONS

ECONOMIC & REGIONAL DEVELOPMENT AGREEMENT

Canada

BC

BRITISH COLUMBIA - UNITED STATES MARKET MATCH SURVEY

RESORT VACATIONS

Prepared for:
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and
Industry, Science and Technology Canada

Prepared by:
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The responsibility for the content of this report is the consultant's alone, and the conclusions reached herein do not necessarily reflect the opinions of those who assisted during the course of this investigation or the federal and provincial governments which funded the study.

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BACKGROUND

The Ministry of Development, Trade and Tourism in British Columbia is concerned that the province remain competitive in the international tourism market. B.C. has resisted the decline in tourism most successfully during 1989 and 1990, while other Canadian provinces have suffered seriously. The task at hand now is to make B.C. more attractive to the potential international tourist, thereby ensuring that our industry will remain healthy in the years ahead.

This report forms part of the results derived from the 1991 U.S. Product Market Match Study, a project undertaken by Campbell Goodell Consultants to assess the market potential of current and future British Columbia tourism products in key United States centres and to provide a matching between these products and the characteristics of the market segments most interested in these products.

This is one of a series of four reports, each one devoted to one of the major vacation types investigated in the study. These were: the resort vacation, the city trip, the outdoor adventure and the touring holiday.

METHOD

The results reported below are based on a telephone survey conducted by Campbell Goodell Consultants Limited, in conjunction with Gilmore Research Group, in six American cities representing major sources of travellers to British Columbia. Interviews were conducted during the month of February, 1991 in Seattle, Portland, San Francisco, Los Angeles, Dallas and Chicago. A breakdown of the number of interviews per city is as follows:

Seattle	164
Portland	162
San Francisco	160
Los Angeles	160
Dallas	162
Chicago	161
	969

The survey was limited to those respondents, 25 years of age or older, who have travelled outside the United States during the past three years of who plan to do so in the next two years.

A second part of the study was provided by Compusearch Market and Social Research of Vancouver, using their Lifestyle Analysis procedure. This procedure assigns a lifestyle code to each of the respondents. There are 47 different groups in all (although only about six of these appear frequently among American visitors to British Columbia). Members of each group share common characteristics, including travel preferences.

PRODUCT DESCRIPTION

"A resort vacation" was defined for respondents in the survey as follows:

> "A resort vacation to a resort or a resort area where a wide variety of activities, such as beaches, skiing, golfing, tennis, horseback riding and so on, were available close by or on the premises."

A. SIZE OF POTENTIAL MARKET

Estimating the size of the potential market for B.C. resort vacations involves assessing respondents' likelihood of visiting B.C. for this particular type of vacation. In order to do this, rating information was collected using a scale from 1 (not at all interested) to 5 (extremely interested). A conservative approach applied to obtain market potential projections using the five (extremely interested) ratings only. A more optimistic approach would use both the four and five ratings. We will present both sets of information but will focus our projections on the five (extremely interested) ratings.

A resort vacation was selected as the holiday that 33% of our travellers were extremely interested in taking at some future date. Not all of these people, however, have British Columbia in mind, so the potential market has to be reduced accordingly. Of those extremely interested in a resort vacation, 43 percent also say they are extremely interested in a B.C. vacation, yielding a net of 14 percent of all travellers.

In order to estimate the actual market potential that exists for resort vacations to B.C., we need to look at the overall percentage of travellers who have travelled outside the U.S., or plan to, and the total population of the area. These figures can be seen in Table I below.

Table I: Market Potential of U.S. International Travellers

	MARKET SIZE					
	Seattle - King Co.	Portland - Multomah Co.	San Fran Bay Area - S.F. Co.	Los Angeles - L.A. Co.	Dallas - Dallas Co.	Chicago - Cook Co.
1990 Population	1,000,702	371,779	3,934,685	5,518,676	1,176,450	4,968,305
Incidence of Internat. Travellers (25+)	28.7	14.4	30.9	15.3	14.7	17.2
Market Size	287,201	53,536	1,215,818	844,357	172,938	854,548

To determine the market share that exists for resort vacations within B.C. we have to apply the 14 % of travellers who said they were extremely interested in resort vacations to the market size for each city given in the previous table. The results of this are shown in Table II.

Table II: Potential U.S. Travellers to B.C. for Resort Vacations

Seattle Area	40,208
Portland Area	7,495
San Francisco Area	170,215
Los Angeles Area	118,210
Dallas Area	24,211
Chicago Area	119,637
Total	479,976

This approach to estimating suggests a total potential market of 480,000 U.S. travellers who would be extremely interested in taking resort vacations in B.C. In terms of the number of people that make up the potential market, the San Francisco area and the Los Angeles area constitute the two largest groups. The Chicago area is the third largest market for potential travellers, followed by Seattle and Dallas.

The smallest potential market is in the Portland area, but it still accounts for 7,559 travellers.

Note that these are estimates of the total number of travellers. Since they do not take into account the frequency of travel, they will be smaller than the total number of visits, especially for the more proximate cities.

B. MARKET DEMOGRAPHICS

To examine the potential market for resort vacations in detail, we need to look at the demographics of the travellers within this category. The demographics include who makes the major travel decisions in the households, age, gender and city of interview. This information was collected from all respondents who completed the survey and we will discuss these data according to the vacations in which respondents were interested.

Respondents who expressed interest in resort vacations were asked to indicate who made the major travel decisions in their households and the results are shown in Table III. In the table, 4 means the respondents were interested and 5 means they were extremely interested in resort vacations.

Table III: Major Travel Decisions in Household

Q64. Who makes the major travel decisions in your household?

		Interested in Resort Vacations	
	Total Sample	Four	Five
Number of Respondents	967	196	320
Male Head of Household	28%	29%	26%
Female Head of Household	30	28	34
Both Together	41	43	40
Someone Else	1	0	1

From the table above, we see that travellers who claimed to be interested in resort vacations were likely to come from households in which the male and the female heads of household made joint travel decisions. A third of this sample also stated that the female head was ultimately responsible for major travel decisions. In this respect, people interested in resort vacations are very much like the average traveller.

Tables IV and V show the age and gender distribution of the respondents who were most interested in resort vacations are shown.

Table IV: Age Distribution of Respondents

		Interested in Resort Vacations	
	Total Sample	Four	Five
Number of Respondents	969	197	320
Under 25	1%	1%	1%
25 to 34	33	41	44
35 to 44	28	32	30
45 to 54	17	15	13
55 to 64	10	6	6
65 and over	11	5	6

Table V: Gender Distribution of Respondents

		Interested in Resort Vacations	
	Total Sample	Four	Five
Number of Respondents	969	167	320
Female	55%	48%	59%
Female	45	52	41

Three fourths of all travellers who are interested in resort vacations are between the ages of 25 and 44. It should be noted that the percentage of people who are extremely interested in resort vacations in the 25 to 34 age group is considerably higher than the overall average for that particular group, indicating a higher level of interest within this particular group for this vacation option.

More females would opt for resort vacations than males, with females making up close to 60 percent of those claiming to be extremely interested in this option.

Table VI shows the number of respondents from each of the six cities who were most interested in resort vacations to B.C.

Table VI: City of Interview

	Total Sample	Interested in Resort Vacations	
		Four	Five
Number of Respondents	969	197	320
Seattle	17%	21%	15%
Portland	17	14	15
San Francisco	16	15	13
Los Angeles	16	17	17
Dallas	17	15	22
Chicago	17	18	18

Travellers from Dallas were most likely to opt for resort vacations, accounting for 22% of those who were extremely interested in resort vacations, followed by Chicago at 18%, Los Angeles at 17%, Portland and Seattle area with 15%, and 13% for San Francisco.

C. CLUSTER ANALYSIS

As a part of the interview, a street address and/or nine-digit postal code was collected from each respondent. This information was processed by Compusearch Market and Social Research. The result of this work was to identify each of the respondents in the survey with one of 47 possible geodemographic clusters.

The geodemographic clusters produced by the Compusearch analysis are based on aggregated data provided by the U.S. Census. Each small geographic area, roughly comparable to a Canadian postal code area, is characterized in terms of the average income, family composition, housing type and so forth. In fact, some 1600 indicators are used to characterize each area.

Once the area of residence of a respondent is known, he or she is assigned to the cluster into which this area of residence has been classified. This so-called "lifestyle cluster" allows the analyst to infer from the cluster identity a whole range of behaviours which the individual respondent is likely to share with other members of his or her cluster.

Of the forty-seven possible clusters, those respondents who have visited British Columbia or who plan a visit to the province tend to group into just six of them. These six represent over 45 percent of the total sample. Because these are the largest clusters and because they have a history of visiting British Columbia, they represent the most attractive targets for marketing and are treated in some detail in our analysis.

The following paragraphs give the basic descriptions of the six clusters which are the most important descriptors of international travellers living in the six sampled U.S. cities. The detailed demographics and product preferences of each of these groups can be found in the appendix.

Definitions of the Clusters

Affluent Urban Singles (Cluster 7)

Neighbourhoods in which members of this cluster live tend to be populated by upscale professionals. Often residents of high-priced urban and suburban apartments and condos, these high income singles lead an active lifestyle characterized by sporting activities, travel and an avid appetite for entertainment events of all kinds. Affluent Urban Singles tend to be aware of the newest trends and technologies, and indulge their taste for the new and different in areas as diverse as home entertainment systems and personal exercise equipment. Their purchase preferences lean toward high quality merchandise of all kinds, particularly home technology products. Financially, they tend to be greater risk-takers than some of their older cluster counterparts and concentrate more on investments with higher risk and bigger payoff.

This cluster represents 2.9 percent of the adult population of the United States and 13.5 percent of the present sample.

Young Professionals (Cluster 10)

Members of this cluster tend to live in neighbourhoods characterized by the presence of young, average income, single professionals. The members of this cluster share many characteristics with their more upscale High Rent Single Professional counterparts, including multi-unit dwellings and active lifestyles. Unlike the latter, however, Well-Educated Young Single Professionals tend to be younger and less asset rich. Extremely fitness and health conscious, their interests include sporting goods, gourmet and health foods and exercise equipment. While their income is still growing, these individuals indulge their taste for luxury with credit products including personal loans and credit cards. They are, however, beginning to accumulate assets in long-term deposit instruments and are likely, when able, to invest in brokerage accounts.

This cluster comprises 1.4 percent of the U.S. adult population and 6.5 percent of the sample.

Highly Mobile Working Couples (Cluster 12)

These above-average income, white collar workers are likely to live in two income families. Their primary focus is on their homes - expenditures on home furnishings and technologies are significantly higher than the national average. That is not to imply, however, that Young Mobile Working Couples with Children are homebodies. These young families are also active in a number of sports activities including golf, tennis, racquetball and skiing.

This cluster accounts for 3.8 percent of the U.S. adult population and 6.3 percent of the present sample

Young Urban Educated Singles (Cluster 17)

Characterized as young, well educated and single, residents of these clusters lead the active single life. Although they may earn only average incomes, their education and professional experience combine to predict an upwardly mobile lifestyle. These individuals tend to reside in high rent apartments, and enjoy an upscale lifestyle. Well-Educated Young Mobile Single Apartment-Dwellers are avid participants in sports ranging from bicycling to racquetball, but their activities are not confined to the sports arena. They also enjoy live theatre, concerts, movies, and restaurant dining on a frequent basis. In addition, they appreciate the quality in articles as diverse as fashionable clothing and imported wines.

This cluster makes up 2.2 percent of the adult American population and 7.0 percent of the sample.

Young Urban Ethnics (Cluster 24)

An urban based cluster, this group contains households living in multi-family dwelling units, typically earning low incomes. Characterized by singles, Young Urban Ethnic Low Income Mobile Single households are likely to be headed by either females or members of various ethnic groups. The ethnic nature of this segment translates into a strong demand for gourmet and imported food items and beverages. This feature makes Young Urban Ethnic Low Income Mobile Single areas excellent target markets for products and services which have an ethnic appeal, as well as travel related services associated with their ethnic origins. In addition, these individuals are good markets for sporting activities, demonstrating a propensity for skiing, camping, jogging and attendance at professional sporting events.

Members of this cluster make up 2.6 percent of the U.S. adult population and 7.9 percent of the sample.

Young Mobile Apartment Dwellers (Cluster 25)

The urban areas in which members of this cluster live represent a younger, active segment - similar to Young Urban Ethnics without the ethnic flavour. Apartments, below average income and blue collar occupations typify these city-based households. Product preferences associated with this group include soft drinks, domestic beer and snack candy, as well as activities such as camping, skiing and fishing. Households living in Cluster 25 areas are also more likely than average to be headed by females.

In the U.S. adult population, 2.6 percent of adults belong to this cluster, as compared to 4.4 percent of the sample.

These cluster descriptions contain information that might have been anticipated. For example, we find that a large proportion of international travellers are young, often living in rented housing. Both characteristics correlate with high levels of mobility and, naturally enough, a high incidence of international travel.

Other patterns might not have been guessed. There is a high proportion of ethnics in the sample, especially Hispanics. This is doubtlessly due to the fact that many Hispanic residents of Los Angeles and Dallas travel to Mexico to visit relatives on a relatively regular basis. While level of interest in travel to Canada is relatively high, so is the level of disinterest, suggesting that this will probably be a difficult cluster to attract.

Finally, perhaps the most surprising characteristic of the six clusters described above is that they are not high income earners. Only two of the clusters are above average in income and only one can be described as "up-scale." One reason this occurs is of course because there are more middle income people in the population, even of the population of international travellers, than there are high income people. These data also suggest that people who visit British Columbia may be less affluent than those who travel to other international destinations.

We would be remiss not to point out, however, that in spite of their small numbers, members of the up-scale clusters in the sample do travel internationally with disproportionate frequency. The following lists the most affluent clusters, all of which are higher on the socio-economic scale than the top cluster described above. In addition, we provide the proportion each cluster comprises of the U.S. population and of the sample, as well as an index of over-representation (the quotient of the two previous figures).

Cluster	% of U.S.	% of Sample	Index
Top income, highly educated professionals in prestige homes	1.5	3.1	209
Well-educated mobile professionals in new homes and condos	1.2	1.8	148
Younger mobile professionals, home-owners with children	2.2	3.4	157
Mature Professionals with larger families (teenagers)	1.7	2.4	141
Non-mobile professionals in established communities	2.7	4.9	182
Younger mobile large families with children in new homes	3.1	3.2	104

We can see that all of these clusters are more likely than average to be international travellers. While they represent just over 12 percent of the adult population of the U.S., they comprise nearly 19 percent of international travellers in our sample. Some of this over-representation arises from the fact that our sample is restricted to urban areas where these clusters tend to live. Nevertheless, individuals in these groups should also receive marketing attention, particulary since they do not report much travel to British Columbia. This is especially true of any segment of the provincial tourism industry which is targeted toward up-scale travellers, such as wilderness resorts.

Importance for Resort Vacations

The clusters with the highest level of interest in resort vacations are:

Cluster 25 (Young Mobile Apartment Dwellers), of whom 35% expressed interest in resort vacations. Nearly all of this group lives in Seattle and Portland. One-third of them have visited B.C. in the last three years and they are more knowledgeable about B.C., compared to the other groups.

Cluster 17 (Young Urban Educated Singles), with 31% showing high levels of interest in resort vacations. These people are part of a large group and live in all of the U.S. cities sampled. Less than one-third of this group has been to B.C., but they are interested because of the scenery. Their knowledge of B.C. is limited.

Cluster 10 (Young Professionals), 29% of whom expressed a preference for resort vacations. These people tend to live in Seattle or Portland and are willing to spend less than any other group for a resort vacation ($136 per night, on average).

D. TRAVEL EXPERIENCE AND INTERESTS

An examination of respondents' travel experiences and their future plans would assist in determining the preferences of the travellers and the size of the potential market for B.C. The number of people who indicate an interest in travel to B.C. in the near future constitute the most significant part of the potential market.

In order to get an idea of the past history of these travellers, respondents were asked about their travel destinations in the last 3 years, which is shown in Table VII. We note, however, that many respondents gave more than one response for this question.

Table VII: Vacation Destinations of the Last 3 Years

Q3. Thinking of your major vacation travel to any location, what vacation destination have you travelled to in the last three years?

		Interested in Resort Vacations	
	Total Sample	Four	Five
Total Number	969	197	320
Europe	33%	36%	25%
Mexico/Central/South America	30	31	34
Other U.S. States	20	21	20
Other	19	17	22
California	14	17	13
Caribbean	13	15	18
Asia	12	11	13
Vancouver	**11**	**15**	**10**
Hawaii	11	12	15
Pacific Northwest	6	5	7
Australia/New Zealand/ South Pacific	6	6	7
Other Canada	6	5	3
Victoria	**5**	**5**	**6**
Ontario	4	5	3
Other B.C.	**4**	**5**	**4**
None	4	5	3
Alaska	3	1	3
Alberta	1	0	1

Mexico, Central America and South America were the major vacation destinations that respondents in this category had travelled to in the last three years. Europe was second with other U.S. states coming in as the third most popular vacation destination. The place that had been least often selected for a vacation was Alberta.

In terms of B.C. as a vacation destination, 10% had been to Vancouver in the last three years. Victoria came in fourteenth in the list of locations that were mentioned by respondents, with 6% having visited it recently. Other places in B.C. had been a destination for 4% of the travellers. After eliminating the multiple B.C. destinations for each traveller, we have a net of 16% of the respondents who mentioned B.C. as their destination at least once. This percentage would constitute the market of existing travellers that could be attracted back into the province.

Travellers who are extremely interested in resort vacations have about the same portion of B.C. visits as all travellers sampled.

In the next table, we look at the destinations these respondents intend to visit in the next 2 years. We note that some travellers gave more than one response.

Table VIII: Vacation Destinations in the Next 2 Years

Q4. And what destinations do you have firm plans to visit during the next two years?

		Interested in Resort Vacations	
	Total Sample	Four	Five
Total Number	969	197	320
None	27%	27%	23%
Europe	21	19	20
Mexico/Central/ South America	16	16	18
Other U.S. States	13	21	20
Other	19	15	12
Caribbean	7	7	12
Asia	7	4	6
Hawaii	6	7	10
Australia/New Zealand/ South Pacific	6	5	6
Vancouver	**5**	**7**	**4**
California	5	6	7
Pacific Northwest	4	4	4
Other Canada	3	3	2
Ontario	2	2	1
Other B.C.	**2**	**3**	**2**
Alaska	2	1	3
Victoria	**1**	**1**	**1**
Alberta	1	1	1

Europe and other U.S. states were the most popular destinations for travellers who were extremely interested in resort vacations in the next two years. This was followed by Mexico, Central and South America.

In terms of potential market for B.C., Vancouver was a choice for 4% of the travellers. Other B.C. destinations and Victoria would only be visited by about 3% of the respondents. The net number of people who say they will take at least one vacation within B.C. in the next two years is 7%. Prospects for resort vacations are similar to all travellers interviewed.

The next question deals with the respondents' knowledge of B.C. as a vacation destination.

Table IX: Knowledge of B.C. as a Vacation Destination

Q44. How much do you know about B.C. as a vacation destination?

		Interested in Resort Vacations	
	Total Sample	Four	Five
Number of Respondents	961	196	317
A great deal	11%	11%	8%
A moderate amount	32	35	29
A little	34	35	36
Nothing at all	23	19	27

Two-thirds of the travellers who preferred this type of holiday have some knowledge of B.C. One quarter of respondents knew nothing at all about B.C. as a vacation destination.

The number of travellers who have taken vacations in B.C. is shown in the next table.

Table X: Number of Travellers Who Have Taken A Vacation In B.C.

Q45. How many times, if any, have you taken any kind of vacation in B.C. for one night or longer?

		Interested in Resort Vacations	
	Total Sample	Four	Five
Number of Respondents	957	197	318
Vacationed in B.C. one night or longer	51%	47%	43%
None	49	53	57
Mean number of trips	3.3	3.8	2.2

From the table above we see that four out of ten travellers who were extremely interested in resort vacations have been to B.C. for a vacation at least one night or longer. Compared to the average traveller, a higher percentage of people who were extremely interested in resort vacations have never been to B.C.

The table also shows that the average traveller has been to B.C. an average of over 3 times. Compared to this, travellers who were extremely interested in resort vacations have only been to B.C. an average of just over 2 times in the past. This is a third less often than any of the other travellers.

The level of interest in a B.C. vacation displayed by these travellers also needs to be examined in order to determine the percentage share B.C. commands as a potential holiday resort.

Table XI: Interest in A Vacation in B.C.

Q46. How interested are you in taking a vacation of any kind, lasting one night or longer, in British Columbia?

		Interest in Resort Vacations	
	Total Sample	Four	Five
Number of Respondents	937	192	314
Not at all interested	10%	8%	9%
2	7	8	8
3	21	19	22
4	23	27	19
Extremely Interested	39	15	43

Four out of ten travellers who had selected resort vacations as their main choice indicated that they would be extremely interested in coming to B.C. on holidays. Only a small percentage (9%) of the respondents in the same category were not at all interested in B.C. as a destination.

E. SPECIFIC PRODUCT PREFERENCES

All the tables presented in this section are based on quotas that were created to provide an adequate sample for each vacation option.

Those respondents who indicated that they would be interested in resort vacations were asked about the costs. Table XII gives us the average amounts that respondents in each city sampled were willing to spend on such a vacation.

Table XII: Average Cost Per Day For Resort Vacation

Q10C How much per day would you be willing to pay for a resort vacation?

	Number of Respondents	Mean Amount Per Day
Total Sample	227	$155
Seattle/ Portland	72	$137
San Francisco/ Los Angeles	66	$139
Dallas/ Chicago	89	$181

Respondents from Dallas and Chicago were willing to spend far more on resort vacations than were respondents in other cities.

The younger respondents indicated that they would spend less on average for this type of vacation. On the other hand, respondents who were sixty-five and over would spend more on resort vacations.

Travellers who showed a greater preference for resort vacations were asked about their travel preferences to their vacation destinations, and the results are shown in Tables XIII and XIV.

Table XIII: Maximum Number of Hours Willing To Travel

	Interested in Resort Vacations						
	Total Sample	Seattle	Portland	San Francisco	Los Angeles	Dallas	Chicago
Number of Respondents	251	41	40	33	42	49	46
Mean Hours	11	13	11	14	12	9	10

Table XIV: Travel by Air or Car

	Interested in Resort Vacations						
	Total Sample	Seattle	Portland	San Francisco	Los Angeles	Dallas	Chicago
Number of Respondents	210	32	31	27	37	40	43
Air	73%	59%	65%	85%	79%	73%	77%
Car	23	25	35	15	16	25	23
Other	4	16	0	0	5	2	0

Respondents indicated that, on average, they would be willing to travel an average of eleven hours to get to their vacation destinations. Travellers from San Francisco were willing to travel the furthest to get to their vacation destinations for resort vacations, while travellers from Dallas would only travel an average of 9 hours.

The majority of travellers from all cities also indicated that their preferred mode of travel on resort vacations would be by air. We see that 85% of the travellers from San Francisco would fly to their vacation destinations, while only 59% of the respondents from Seattle would travel by air. Interestingly, a large number of travellers from Seattle (16%) would travel by some other means on a resort vacation to get to their destinations.

If the resort holiday were the major vacation during the year, respondents would stay away an average of eleven nights. People sampled in the San Francisco area, unlike the average traveller, would stay away longer (14 nights). On the other hand, travellers from Dallas would only stay away nine nights, which was less time than the average traveller would plan to spend on vacation. We see these figures in Table XV.

Table XV: Average Number of Nights Away From Home

	Interested in Resort Vacations						
	Total Sample	Seattle	Portland	San Francisco	Los Angeles	Dallas	Chicago
Number of Respondents	251	41	40	33	42	49	46
Mean Number of Nights	11	13	11	14	12	9	10

While on resort vacations, a large proportion of the people interviewed stated that they would like middle-range accommodations. Respondents from Seattle and Portland overwhelmingly favoured these types of accommodation. However, people from the San Francisco and Los Angeles area indicated a preference for places that were more luxurious.

Table XVI: Degree of Luxury Wanted for this Vacation

	Interested in Resort Vacations						
	Total Sample	Seattle	Portland	San Francisco	Los Angeles	Dallas	Chicago
Number of Respondents	256	44	40	34	42	49	47
The most luxurious	8%	7%	2%	21%	12%	6%	2%
First Class	34	23	28	29	50	37	38
Middle Range	49	63	58	44	36	45	47
Basic Accommodation	8	7	10	3	2	12	11
Other/Depends	1	0	2	3	0	0	2

The next series of questions dealt with activities that might be a part of a resort vacation.

Table XVII: Interest in Marine Resorts

Q28. How interested would you be in the following activities that you might do on a resort vacation: Marine resorts.

		Interested in Marine Resorts	
	Total Sample	Four	Five
Number of Respondents	969	62	86
Seattle	17%	21%	14%
Portland	17	10	17
San Francisco	16	16	16
Los Angeles	16	15	20
Dallas	17	22	19
Chicago	17	16	14

We can see that, among people who indicated they were extremely interested in marine resorts, the biggest percentage came from the Los Angeles sample.

Dallas was the next largest group within the extremely interested category with 19% saying thay were extremely interested in marine resorts, followed by Portland with 17% responding similarly. Travellers from Seattle and Chicago, with only 14% from each city stating they were extremely interested in this activity, showed the least enthusiasm.

Younger travellers interviewed were more interested in marine resorts than the older participants.

Table XVIII: Interest in Fishing Resorts

Q29. How interested would you be in the following activities that you might do on a resort vacation: Fishing resorts.

		Interested in Fishing Resorts	
	Total Sample	Four	Five
Number of Respondents	969	24	30
Seattle	17%	17%	13%
Portland	17	33	20
San Francisco	16	0	10
Los Angeles	16	25	10
Dallas	17	13	27
Chicago	17	12	20

For this activity, we need to keep in mind that only a small number of travellers indicated that they would be inclined to holiday in fishing resorts. However, out of the travellers who were extremely interested in fishing resort vacations, the largest percentage was from Dallas.

Travellers from Portland and Chicago made up the next largest group of people who were extremely interested in this vacation, with two out of ten people showing extreme interest in fishing resorts.

The smallest percentage of travellers who were extremely interested came from San Francisco and Los Angeles.

The females in this sample were less likely to undertake such an activity while on vacation, as close to two-thirds of the females showed a lack of interest in fishing resorts.

Table XIX: Interest in Ski Resorts

Q30. How interested would you be in the following activities that you might do on a resort vacation: Ski resorts.

		Interested in Ski Resorts	
	Total Sample	Four	Five
Number of Respondents	969	54	61
Seattle	17%	17%	12%
Portland	17	22	16
San Francisco	16	7	18
Los Angeles	16	26	20
Dallas	17	17	18
Chicago	17	11	16

Two out of ten travellers who were interested in ski resort vacations were from Los Angeles.

Travellers from San Francisco and Dallas made up the second largest percentage of people who were extremely interested in ski resorts. This was followed by travellers in Portland and Chicago.

Seattle travellers made up the smallest percentage of people who were extremely interested in ski resorts.

The preference for ski resorts was apparently related to the age of respondents. An overwhelming majority of younger respondents were interested in this vacation, as opposed to the minority of older people who would undertake such an option.

Table XX: Interest in Golf Resorts

Q31. How interested would you be in the following activities that you might do on a resort vacation: Golf resorts.

		Interested in Golf Resorts	
	Total Sample	Four	Five
Number of Respondents	969	25	45
Seattle	17%	24%	20%
Portland	17	16	18
San Francisco	16	8	5
Los Angeles	16	16	13
Dallas	17	16	22
Chicago	17	20	22

The largest percentage of travellers who were extremely interested in golf resorts came from Dallas and Chicago, accounting for 22% each. Next were Seattle, Portland and Los Angeles.

Travellers from San Francisco accounted for a substantially smaller percentage of people interested in golf resorts, with only 5% stating they were extremely interested. There was far less chance that these travellers would go to golf resorts than the other type of resorts.

There was less likelihood that female heads of household would go to such resorts. More than half the females interviewed would not go to golf resorts as compared with a third of the male heads of household.

Table XXI: Interest in Guest or Dude Ranches

Q32. How interested would you be in the following activities that you might do on a resort vacation: Guest or dude ranches.

		Interested in Guest or Dude Ranches	
	Total Sample	Four	Five
Number of Respondents	969	26	16
Seattle	17%	24%	6%
Portland	17	23	6
San Francisco	16	4	6
Los Angeles	16	15	31
Dallas	17	19	38
Chicago	17	15	13

A small number of travellers indicated that they would be interested in going to guest or dude ranches as part of resort vacations. The largest percentage of travellers who were extremely interested in this activity came from Dallas, making up a over third of this category. Travellers from Los Angeles made up close to a third of the extremely interested category.

The smallest number of travellers who were extremely interested in this vacation option came from Seattle, Portland and San Francisco, with only 6% showing extreme interest.

Table XXII: Interest in Health Resorts

Q33. How interested would you be in the following activities that you might do on a resort vacation: Health resorts.

		Interested in Health Resorts	
	Total Sample	Four	Five
Number of Respondents	969	42	27
Seattle	17%	7%	15%
Portland	17	17	7
San Francisco	16	10	22
Los Angeles	16	19	26
Dallas	17	12	15
Chicago	17	35	15

Travellers from Los Angeles form the largest percentage of people who are extremely interested in health resorts, making up a quarter of this category. This is followed by travellers from San Francisco, who account for two out of every ten people who said they were extremely interested in health resorts.

Travellers from Seattle, Dallas and Chicago each constitute 15% of the extremely interested category. Travellers from Portland made up the smallest number of respondents who were extremely interested in health resorts.

Table XXIII: Interest in Wilderness Resorts

Q34. How interested would you be in the following activities that you might do on a resort vacation: Wilderness resorts which are not accessible by automobile.

		Interested in Wilderness Resorts	
	Total Sample	Four	Five
Number of Respondents	969	39	23
Seattle	17%	10%	17%
Portland	17	23	13
San Francisco	16	10	9
Los Angeles	16	8	26
Dallas	17	21	17
Chicago	17	28	17

The largest group of travellers within the extremely interested category for wilderness resorts were from Los Angeles, accounting for one fourth of the total.

Travellers from Seattle, Dallas and Chicago each make up 17% of the extremely interested category. San Francisco has the lowest percentage of travellers who would be extremely interested in wilderness resorts, accounting for only 9% of the category.

The average level of interest displayed by the respondents for each of the activities discussed above is seen in Table XXIV.

Table XXIV: Mean Levels of Interest in Specific Activities

	Interested in Resort Vacations
	Total Sample
Number of Respondents	232
Marine Resorts	3.6
Ski Resorts	3.0
Health Resorts	2.6
Golf Resorts	2.4
Wilderness Resorts	2.4
Fishing Resorts	2.3
Guest or Dude Ranches	2.2

Out of all the activities presented to the respondents, marine resorts were the most preferred. The group that felt strongly about this came from the San Francisco and Los Angeles area. However, this was the first choice for many people from the other cities as well.

Second was ski resorts, followed by health resorts. Golf resorts and wilderness resorts were fourth and fifth in level of popularity. In sixth place was fishing resorts.

Guest or dude ranches ranked lowest in the scale. This would be the last choice for a large proportion of the sample.

A final question in this section asked respondents if there were any other activities they would like to partake in while on resort vacations. The results are shown in Table XXV.

Table XXV: Other Vacation Activities of Interest

Q35. Is there any other type of vacation activity in particular that would interest you more than any of the ones that I have just mentioned?

	Total Sample	Seattle	Portld.	S.F.	L.A.	Dallas	Chic.
Number of Respondents	135	27	20	19	20	26	23
Beaches	19%	29%	25%	11%	15%	22%	9%
Swimming/ Snorkling/ Scuba Diving	10	7	5	16	10	11	13
Tennis	9	4	0	11	15	11	13
Other Water Sports	8	4	5	20	5	4	13
Other	8	11	10	16	0	4	9
Touring/ Sightseeing/ Exploring	5	4	5	0	10	8	4
Cruises	4	8	0	0	10	4	4
Music/ Entertainment	4	0	5	5	15	0	4
Family/Kids Activities	4	4	15	0	0	0	9
Relax/Rest	4	15	0	5	5	0	0
Other Sports	4	0	0	11	5	0	9

Meet People/ Learn Culture	4	7	0	0	5	8	0
Sailing	3	0	5	0	0	12	0
Historical/ Archaeolo-gical Sites	3	0	5	0	5	4	4
Gambling	2	0	5	0	0	0	9
Bicycling	1	0	0	5	0	0	0
Horseback Riding	1	0	5	0	0	0	0
Fishing	1	0	0	0	0	4	0
Hunting	1	0	5	0	0	0	0
Skiing/Cross Country Skiing	1	0	0	0	0	4	0
Museums/ Gall. Cult.	1	4	0	0	0	0	0
Visit Friends/ Family	1	0	5	0	0	0	0
Shopping	1	4	0	0	0	0	0
Religious Activities	1	0	0	0	0	4	0

The number of travellers who responded to this question was very small. We need to keep this in mind when examining the data provided in the above table.

The most popular other activity on a resort vacation was going to the beaches, which made up 19% of this sample. Travellers from Seattle and Portland were more interested in this activity than any of the other cities. There was a less than average likelihood that people from Chicago would be interested in this activity.

Swimming, snorkelling, scuba diving were the next most popular activity that was mentioned by 10% of the travellers who answered this question. Playing tennis was the next popular activity mentioned by 9% of the travellers. A variety of other activities were mentioned but the number of respondents who mentioned them was quite small.

F. MEDIA FACTORS

The effectiveness of present advertising strategies was evaluated through a series of questions that pertained directly to particular slogans used in connection with B.C. The strength of the campaign for Canada as a whole was also surveyed. Questions were asked of travellers to help determine the advertising media that would be the most helpful in getting the message across to them.

Travellers were asked if they had heard the slogan ("Super, Natural") associated with a vacation destination, and we see these results in Table XXVI.

Table XXVI: "Super, Natural" Associated with a Vacation Destination

Q43a. Have you ever heard the slogan "Super, Natural" associated with a vacation destination?

		Interested in Resort Vacations	
	Total Sample	Four	Five
Number of Respondents	951	194	315
Yes	12%	11%	10%
Yes, If mentioned B.C.	8	8	9
No	80	81	81

The slogan "Super, Natural" was unfamiliar to eight out of ten people surveyed who had not heard it in relation to any vacation destination. This slogan was known to only two in ten people who were very interested in resort vacations, of which one in ten volunteered that it was associated with B.C.

Respondents who had heard the slogan "Super, Natural" but had not previously associated it with B.C. were asked the next question.

Table XXVII: "Super, Natural" Associated with B.C.

Q43b. Have you heard the slogan ("Super, Natural") associated with British Columbia?

		Interested in Resort Vacations	
	Total Sample	Four	Five
Number of Respondents	923	190	301
Yes	18%	18%	15%
No	74	73	75
Other	1	1	1
Yes, If mentioned B.C.	7	8	9

Presenting the respondents with both the name (British Columbia) and the slogan ("Super, Natural") made only a small difference to the number of people who had heard of the slogan. Three-quarters of the travellers who were extremely interested in resort vacations still had not heard of the slogan.

The advertising promoting Canada as a vacation destination seems to be more effective as more than three-quarters of the travellers had heard or seen something of these promotions. Tables XXVIII and XXIX show the data for Canada and B.C.

Table XXVIII: Advertising for Canada as a Vacation Destination

Q51. Have you seen or heard any advertising for Canada as a vacation destination during the past year?

		Interested in Resort Vacations	
	Total Sample	Four	Five
Number of Respondents	948	192	314
Yes	81%	85%	76%
No	19	15	24

Table XXIX: Advertising for B.C. as a Vacation Destination

Q52. Have you seen or heard any advertising for B.C. as a destination during the past year?

		Interested in Resort Vacations	
	Total Sample	Four	Five
Number of Respondents	922	188	308
Yes	62%	65%	56%
No	38	35	44

More travellers had heard or seen advertising for Canada during the past year than for B.C. While 76% of the travellers seriously interested in resort vacations had been exposed to advertising about Canada, only 56% had seen advertising for B.C.

Interestingly, although 75% of these travellers had previously said that they had no knowledge of the slogan "Super, Natural", a substantial number of them believe they had been exposed to the advertising.

The next series of questions all dealt with different means of getting information to the travellers. In the following tables, the ratings are based on a 5 point scale, with 1 being not at all useful and 5 being extremely useful.

Table XXX: Brochures as a Source of Information

Q58. How useful do you find the following as a source of information when you are planning a vacation?: Brochures.

		Interested in Resort Vacations	
	Total Sample	Four	Five
Number of Respondents	964	197	317
Not at all useful	8%	6%	6%
2	11	12	8
3	27	31	20
4	28	28	30
Extremely Useful	26	23	36

Brochures were a useful source of information to two-thirds of the travellers who rated resort vacations very highly and higher than average for all travellers. Only 14% of these travellers stated they had little or no use at all for brochures.

Table XXXI: Usefulness of Radio and Television Advertising

Q59. How useful do you find the following as a source of information when you are planning a vacation?: Radio and television advertising.

		Interested in Resort Vacations	
	Total Sample	Four	Five
Number of Respondents	964	197	318
Not at all useful	27%	22%	22%
2	27	32	22
3	27	29	29
4	11	11	14
Extremely Useful	8	6	13

Radio and television advertising is seen by travellers to be a less effective advertising tool than brochures. Four out of ten people in the extremely interested category felt that this was not a useful method of getting the information across, while one out of four people found it to be useful.

Table XXXII: Usefulness of Newspaper and Magazine Articles

Q60. How useful do you find the following as a source of information when you are planning a vacation?: Newspaper and magazine articles and advertising.

		Interested in Resort Vacations	
	Total Sample	Four	Five
Number of Respondents	962	196	318
Not at all useful	8%	5%	9%
2	11	11	8
3	28	34	25
4	29	32	25
Extremely Useful	24	18	33

Over half the travellers who were extremely interested in resort vacations felt that newspaper and magazine articles were useful in helping them to plan their vacations. This was higher than the average for all travellers.

Table XXXIII: Usefulness of Travel Agents or Tour Operators

Q62. How useful do you find the following as a source of information when you are planning a vacation?: Travel agents or tour operators.

		Interested in Resort Vacations	
	Total Sample	Four	Five
Number of Respondents	962	196	318
Not at all useful	15%	11%	11%
2	13	13	10
3	23	29	20
4	24	27	23
Extremely Useful	25	20	36

Travel agents or tour operators are another good source of information on resort vacations. In the group of travellers who were extremely interested in resort vacations, six out of ten people felt travel agents were useful, while two out of ten felt they were not useful.

Table XXXIV: Usefulness of Friends and Relatives

Q62. How useful do you find the following as a source of information when you are planning a vacation?: Friends or relatives.

		Interested in Resort Vacations	
	Total Sample	Four	Five
Number of Respondents	964	195	317
Not at all useful	10%	6%	11%
2	8	7	5
3	19	23	18
4	27	32	24
Extremely Useful	36	32	42

Friends and relatives appear to be one of the most useful sources of information when planning resort vacations. This was a useful source of information to 65% of the respondents in the extremely interested rating, while only 16% found this source of little use.

The overall means for each medium as a useful source of information to people who are extremely interested in resort vacations is presented in the table below.

Table XXXV: Means For Each Medium as a Useful Source of Information

Interested in Resort Vacations

Total Sample

Number of Respondents	320
Friends & Relatives	3.8
Brochures	3.8
Newspapers & Magazines	3.7
Travel Agents & Tour Operators	3.6
Radio & Television	2.7

Travellers who were extremely interested in resort vacations found the information that they received from friends/relatives and brochures to be the most helpful, with mean scores of 3.8 out of 5.0.

This was closely followed by newspaper and magazine articles in third place with a mean of 3.7. The information received from travel agents and tour operators was fourth with a rating of 3.6.

The least useful source of information to travellers extremely interested in resort vacations was advertising seen or heard on radio and television, which only received a rating of 2.7.

G. MARKETING IMPLICATIONS

The size of the potential market for resort vacations in B.C. appears to be large: some 480,000 visitors from these six U.S. metropolitan areas. San Francisco and Los Angeles have the potential to send the largest numbers of visitors, but Dallas residents showed the most likelihood of being interested in resort vacations in B.C. on a percentage basis. Dallas and Chicago residents are willing to spend the most per day for their resort vacations.

Target segments with the greatest potential for B.C. resort vacations are, primarily younger U.S. residents, age 25 to 44. Males and females decide together on their vacation plans, but slightly more females than males say they are extremely interested in resort vacations. The cluster analysis suggests that the best prospects for resort vacations are Young Mobile Apartment Dwellers, Young Urban Educated Singles, and Young Professionals. Many of these people live in Seattle and Portland.

Preferred products in this category appear to be marine and ski resorts, which received the highest interest ratings in the survey. Slightly lower ratings were received for health resorts, golf resorts, wilderness resorts, fishing resorts, and guest or dude ranches, in that order.

The communication media most often used by travellers interested in resort vacations, they say, are the recommendations of friends and relatives, plus brochures. In addition, newspaper and magazine articles, travel agents and tour operators are all given high recognition. Radio and TV are rated lower, but we know from other research studies that many people have difficulty determining the source of their information, so these findings should be considered accordingly.

Advertising and promotion messages may be more important than the media used. It was surprising that 27 percent of U.S. travellers in this survey,who say they are interested in resort vacations, have no knowledge of B.C. at all. Indeed, over half of them have never been to B.C. Since 81 percent of them do not recognize the "Super, Natural" slogan, we would suggest that awareness of B.C. and its advertising is critically needed. To this end, it might be useful to look first to generating much higher levels of awareness for the province as a resort vacation destination, using an appropriate slogan or theme, and secondarily to promoting particular resorts. In most advertising categories, high levels of awareness must precede any gain in volume.

APPENDIX

CLUS. ER 7

Affluent Urban Singles

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	37.6	19.9	189
White Collar	74.7	53.4	140
Blue Collar	15.2	30.9	49
Unskilled	2.1	5.0	42
HOUSEHOLD COMPOSITION			
Female Householder	33.9	24.3	140
Black Householder	7.4	10.5	70
Spanish Householder	4.6	4.7	98
Asian Householder	4.0	1.0	400
Householder Age 65+	17.1	21.4	80
Married Couples	41.1	58.5	70
Households w/ Children	22.4	41.0	55
Two Workers	57.7	52.8	109
SESI	77	48	160
INCOME			
Income 0 to 25K	13.9	39.4	35
Income 25K+ to 50K	68.4	45.0	152
Income 50K+ to 75K	15.3	12.5	122
Income 75K+	2.4	3.1	77
Median HH Income	$29,715	$24,533	122
HOUSING			
Single Family Homes	44.6	81.2	55
Multi-Family Homes	55.4	18.8	295

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	28.5	35.0	81
Some College	20.8	14.6	142
College Graduate	33.0	14.1	234
Median # Years Comp.	13.8	12.2	113
AGE DISTRIBUTION			
Age 0-5 Years	2.9	4.1	71
Age 0-17 Years	8.9	15.5	57
Age 18-34 Years	20.9	27.4	76
Age 35-54 Years	9.2	13.0	71
Age 55-64 Years	6.4	8.8	73
Age 65+ Years	8.0	11.2	71
Median Age in Years	39.6	40.0	99
LENGTH OF RESIDENCE (in Years)	5.3	8.0	66

1988 U.S. HOUSING POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S.
Households	2,970,383	90,328,747	3.3
Adult Population	5,232,446	181,649,997	2.9

CLUSTE.. 7

PRODUCT PREFERENCES

FINANCIAL SERVICES

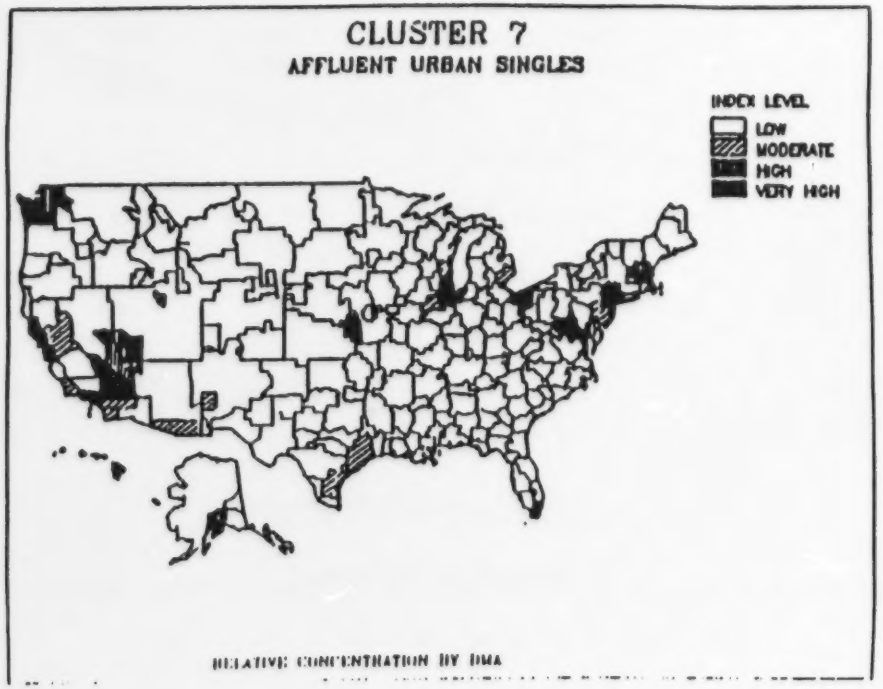
American Express Gold Card
Investment Property
Travel/Entertainment Cards
Brokerage Accounts
Insured Money Market Accounts
Temporary Insurance
Mutual Fund
Common Stock
IRA
Interest Bearing Checking Accounts

LEISURE PURSUITS

Domestic Travel
Snow Skiing
Attend Horse Races
Foreign Travel
Photography
Golf
Camping
Live Theatre/Concerts
Attend Pro Sports Events
Frequently Attend Movies

SPENDING HABITS

Gourmet Ice Cream
Discount Airlines
Imported Beers
Imported Whiskey
Frozen Yogurt
Lowfat Milk
Diet Soft Drinks
Imported Cars
Bottled Water
Imported White Wines



CLUSTER 10

Young Professionals

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	36.8	19.9	185
White Collar	69.2	53.4	130
Blue Collar	17.6	30.9	57
Unskilled	2.4	5.0	48
HOUSEHOLD COMPOSITION			
Female Householder	30.9	24.3	127
Black Householder	4.5	10.5	43
Spanish Householder	2.9	4.7	62
Asian Householder	1.9	1.0	190
Householder Age 65+	17.5	21.4	82
Married Couples	46.4	58.5	79
Households w/ Children	27.0	41.0	66
Two Workers	59.9	52.8	113
SESI	72	48	150
INCOME			
Income 0 to 25K	22.3	39.4	57
Income 25 to 50K	64.7	45.0	144
Income 50 to 75K	11.6	12.5	93
Income 75K+	1.4	3.1	45
Median HH Income	$26,950	$24,533	110
HOUSING			
Single Family Homes	70.7	81.2	87
Multi-Family Homes	29.3	18.8	156

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	24.8	35.0	71
Some College	21.9	14.6	150
College Graduate	36.6	14.1	260
Median # Years Comp.	14.1	12.2	116
AGE DISTRIBUTION			
Age 0-5 Years	3.7	4.1	90
Age 0-17 Years	11.5	15.5	74
Age 18-34 Years	25.3	27.4	92
Age 35-54 Years	12.0	13.0	92
Age 55-64 Years	6.7	8.8	76
Age 65+ Years	9.2	11.2	82
Median Age in Years	35.5	40.0	89
LENGTH OF RESIDENCE (in Years)	4.9	8.0	61

1988 U.S. POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S
Households	1,375,287	90,328,747	1.5
Adult Population	2,590,603	181,649,997	1.4

CLUSTER 10

PRODUCT PREFERENCES

FINANCIAL SERVICES

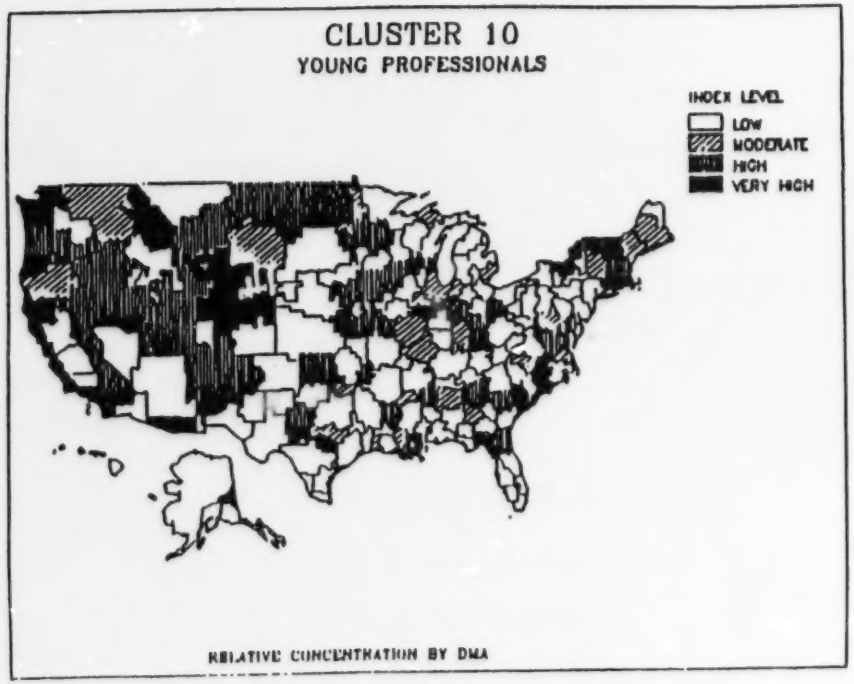
Mutual Funds
Second Mortgage/Home Equity Loans
Auto Loan - New Car
American Express Gold Card
Insured Money Market Account
Prepaid Health Program
Temporary Insurance
Home Improvement Loans
Long Term Savings Certificate
Accounting Services

LEISURE PURSUITS

Snow Skiing
Camping
Jogging
Golf
Live Theatre/Concerts
Bicycling
Domestic Travel
Public Issue Involvement
Frequently Attend Movies
Tennis

SPENDING HABITS

Imported Beers
Gourmet Foods
Diet Soft Drinks
Frozen Yogurts
Upscale Cosmetics
Paperback Books
Jewelry
Imported Cars
Bottled Water
Domestic White Wine



CLUSTER 12

Highly Mobile Working Couples

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	26.3	19.9	132
White Collar	63.2	53.4	118
Blue Collar	24.2	30.9	78
Unskilled	3.2	5.0	64
HOUSEHOLD COMPOSITION			
Female Householder	17.7	24.3	73
Black Householder	5.0	10.5	47
Spanish Householder	4.0	4.7	85
Asian Householder	2.0	1.0	200
Householder Age 65+	6.5	21.4	30
Married Couples	65.5	58.5	112
Households w/ Children	49.4	41.0	120
Two Workers	62.1	52.8	118
SESI	68	48	142
INCOME			
Income 0 to 25K	14.2	39.4	36
Income 25K+ to 50K	67.1	45.0	149
Income 50K+ to 75K	16.9	12.5	135
Income 75K+	1.8	3.1	58
Median HH Income	$29,920	$24,533	122
HOUSING			
Single Family Homes	78.7	81.2	97
Multi-Family Homes	21.3	18.8	113

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	35.3	35.0	101
Some College	23.0	14.6	158
College Graduate	22.5	14.1	160
Median # Years Comp.	12.9	12.2	106
AGE DISTRIBUTION			
Age 0 to 5 Years	6.2	4.1	151
Age 0 to 17 Years	19.2	15.5	124
Age 18 to 34 Years	35.9	27.4	131
Age 35 to 54 Years	17.2	13.0	132
Age 55 to 64 Years	6.6	8.8	75
Age 65+ Years	6.1	11.2	54
Median Age in Years	32.7	40.0	82
LENGTH OF RESIDENCE (In Years)	4.1	8.0	51

1988 U.S. POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S.
Households	3,471,871	90,328,747	3.8
Adult Population	6,936,753	181,649,997	3.8

CLUSTER 12

PRODUCT PREFERENCES

FINANCIAL SERVICES

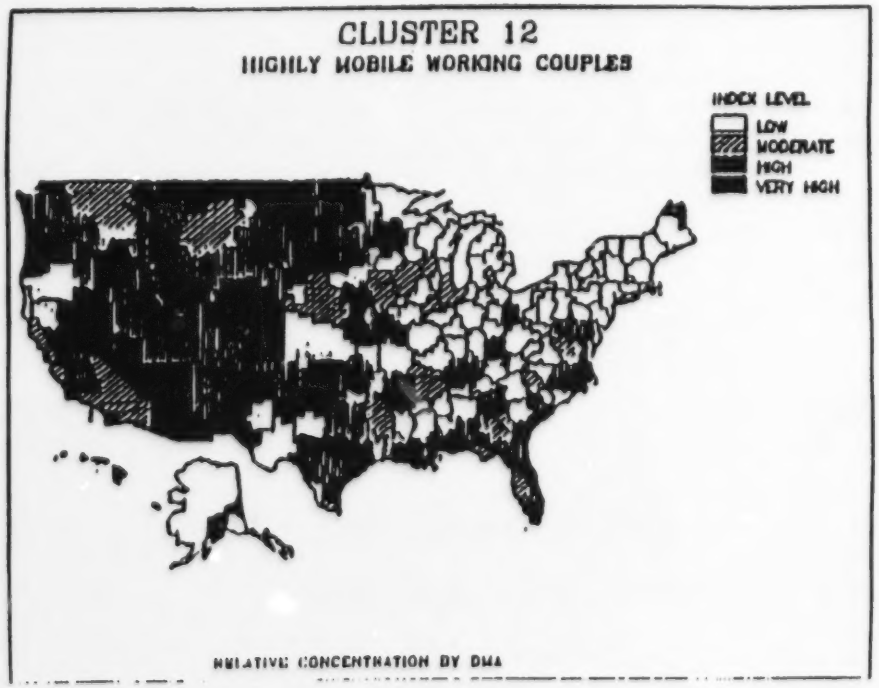
Common Stock
Investment Property
Line of Credit Account
Auto Loan - New Car
Higher Value Life Insurance
Travel/Entertainment Cards
Frequent Stock Transactions
Disability Insurance
Personal Loan (s) - Not for Education
Department Store Credit Cards

LEISURE PURSUITS

Racquet Ball
Golf
Domestic Travel
Tennis
Snow Skiing
Attend Pro Sports Events
Camping
Bicycling
Bowling
Public Issue Involvement

SPENDING HABITS

Imported Beers
Wine Coolers
Mexican Food Ingredients
Soft Drinks (Diet/Regular)
Imported Cars
Imported Wines
Jewelry
Clothing Expenditures
Merchandise by Mail/Phone



CLUSTER 17

Young Urban Educated Singles

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	33.5	19.9	168
White Collar	71.7	53.4	134
Blue Collar	15.4	30.9	50
Unskilled	2.3	5.0	46
HOUSEHOLD COMPOSITION			
Female Householder	33.0	24.3	136
Black Householder	5.7	10.5	54
Spanish Householder	3.7	4.7	79
Asian Householder	2.8	1.0	280
Householder Age 65+	8.5	21.4	40
Married Couples	29.3	58.5	50
Households w/ Children	17.1	41.0	42
Two Workers	59.8	52.8	113
SESI	68	48	142
INCOME			
Income 0 to 25K	41.5	39.4	105
Income 25K+ to 50K	51.9	45.0	115
Income 50K+ to 75K	5.9	12.5	47
Income 75K+	0.7	3.1	23
Median HH Income	$21,912	$24,533	89
HOUSING			
Single Family Homes	43.9	81.2	54
Multi-Family Homes	56.1	18.8	298

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	21.6	35.0	62
Some College	22.3	14.6	153
College Graduate	39.7	14.1	282
Median # Years Comp.	14.0	12.2	115
AGE DISTRIBUTION			
Age 0 to 5 Years	2.4	4.1	59
Age 0 to 17 Years	6.3	15.5	41
Age 18 to 34 Years	23.4	27.4	85
Age 35 to 54 Years	9.2	13.0	71
Age 55 to 64 Years	3.9	8.8	44
Age 65+ Years	4.6	11.2	41
Median Age in Years	27.9	40.0	70
LENGTH OF RESIDENCE (In Years)	2.5	8.0	31

1988 U.S. POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S
Households	2,312,714	90,328,747	2.6
Adult Population	4,014,659	181,649,997	2.2

CLUSTER 17

PRODUCT PREFERENCES

FINANCIAL SERVICES

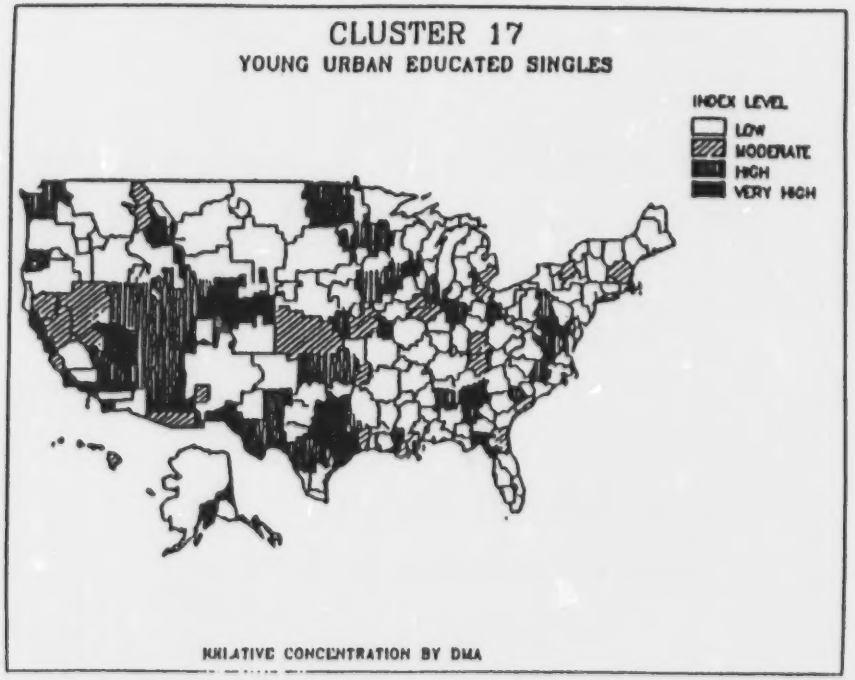
American Express Gold Card
Travelers Cheques
Visa Card
American Express Green Card
Temporary Insurance
Prepaid Health Program
Mutual Fund
Line of Credit Account
Non-Interest Bearing Checking Account

LEISURE PURSUITS

Snow Skiing
Water Skiing
Tennis
Racquet Ball
Frequent Foreign Travel
Jogging
Attend Movies Frequently
Live Theatre/Concerts
Prescribed Physical Fitness Programs
Camping
Bicycling

SPENDING HABITS

Imported Beers
Gourmet Ice Cream
Wine Coolers
Frozen Yogurt
Canned Soups - Single Serving
Diet Soft Drinks
Sports Equipment
Imported Cars
Clothing Expenditures



CLUSTER 24

Young Urban Ethnics

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	20.7	19.9	104
White Collar	56.1	53.4	105
Blue Collar	26.4	30.9	85
Unskilled	4.3	5.0	86
HOUSEHOLD COMPOSITION			
Female Householder	35.7	24.3	147
Black Householder	9.3	10.5	89
Spanish Householder	8.2	4.7	174
Asian Householder	3.8	1.0	380
Householder Age 65+	16.0	21.4	75
Married Couples	33.3	58.5	57
Households w/ Children	24.8	41.0	60
Two Workers	51.0	52.8	97
SESI	48	48	100
INCOME			
Income 0 to 25K	71.4	39.4	181
Income 25K+ to 50K	26.5	45.0	59
Income 50K+ to 75K	2.0	12.5	16
Income 75K+	0.1	3.1	3
Median HH Income	$17,328	$24,533	71
HOUSING			
Single Family Homes	43.6	81.2	54
Multi-Family Homes	56.4	18.8	300

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	31.9	35.0	91
Some College	19.5	14.6	133
College Graduate	16.8	14.1	119
Median # Years Comp.	12.3	12.2	101
AGE DISTRIBUTION			
Age 0 to 5 Years	2.9	4.1	70
Age 0 to 17 Years	8.0	15.5	52
Age 18 to 34 Years	20.6	27.4	75
Age 35 to 54 Years	8.4	13.0	65
Age 55 to 64 Years	4.6	8.8	52
Age 65+ Years	7.0	11.2	63
Median Age in Years	32.8	40.0	82
LENGTH OF RESIDENCE (In Years)	3.3	8.0	41

1988 U.S. POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S.
Households	2,768,664	90,328,747	3.1
Adult Population	4,760,922	181,649,997	2.6

CLUSTER 24

PRODUCT PREFERENCES

FINANCIAL SERVICES

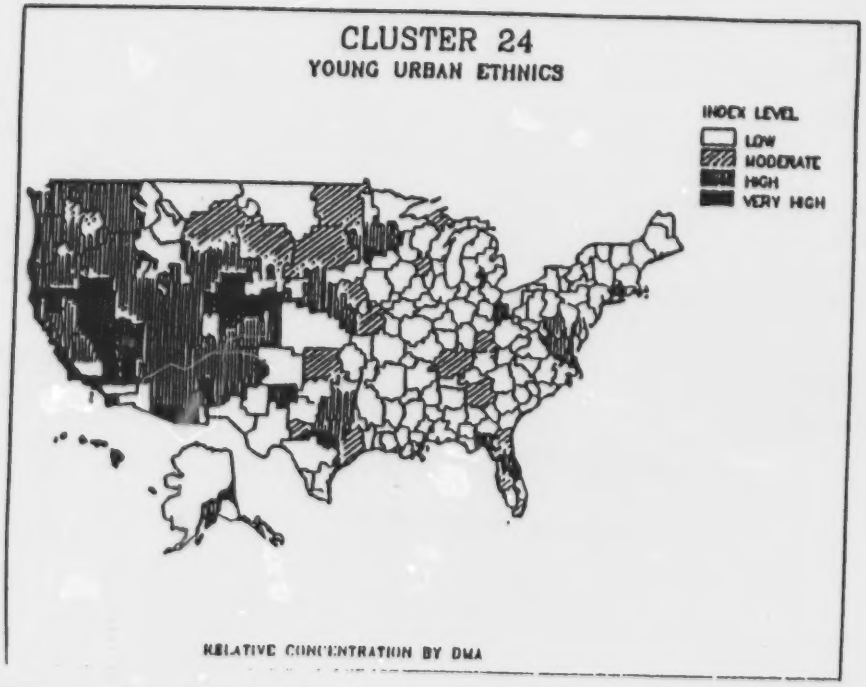
American Express Green Card
Temporary Insurance
Prepaid Health Program
Money Orders
Vision Care Insurance
Travelers Cheques

LEISURE PURSUITS

Snow Skiing
Attend Pro Sports Events
Travel to Mexico
Camping
Jogging
Attend Movies
Water Skiing
Racquet Ball
Bowling
Live Theatre/Concerts

SPENDING HABITS

Gourmet Ice Cream
Imported Beers
Health & Beauty Aids
Stereo Equipment
Records/Tapes
Frozen Yogurt
Wine Coolers
Gourmet Food Items



CLUSTER 25

Young Mobile Apartment Dwellers

DETAILED DEMOGRAPHICS

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
OCCUPATION			
Professional	17.6	19.9	88
White Collar	49.2	53.4	92
Blue Collar	33.5	30.9	108
Unskilled	5.0	5.0	100
HOUSEHOLD COMPOSITION			
Female Householder	29.2	24.3	120
Black Householder	4.4	10.5	42
Spanish Householder	3.7	4.7	79
Asian Householder	1.0	1.0	100
Householder Age 65+	20.4	21.4	95
Married Couples	50.4	58.5	86
Households w/ Children	32.3	41.0	79
Two Workers	52.7	52.8	100
SESI	45	48	94
INCOME			
Income 0 to 25K	58.7	39.4	149
Income 25K+ to 50K	37.5	45.0	83
Income 50K+ to 75K	3.6	12.5	29
Income 75K+	0.2	3.1	6
Median HH Income	$20,411	$24,533	83
HOUSING			
Single Family Homes	21.5	81.2	26
Multi-Family Homes	78.5	18.8	418

	CLUSTER AVERAGE	U.S. AVERAGE	INDEX
EDUCATION			
High School Graduate	36.0	35.0	102
Some College	16.2	14.6	111
College Graduate	11.7	14.1	83
Median # Years Comp.	12.0	12.2	98
AGE DISTRIBUTION			
Age 0 to 5 Years	4.5	4.1	110
Age 0 to 17 Years	14.9	15.5	96
Age 18 to 34 Years	27.9	27.4	102
Age 35 to 54 Years	12.5	13.0	96
Age 55 to 64 Years	8.5	8.8	97
Age 65+ Years	12.9	11.2	115
Median Age in Years	37.0	40.0	93
LENGTH OF RESIDENCE (in Years)	6.1	8.0	76

1988 U.S. POPULATION ESTIMATES

	CLUSTER	U.S.	% U.S.
Households	2,494,365	90,328,747	2.8
Adult Population	4,643,898	181,649,997	2.6

CLUSTER

PRODUCT PREFERENCES

FINANCIAL SERVICES

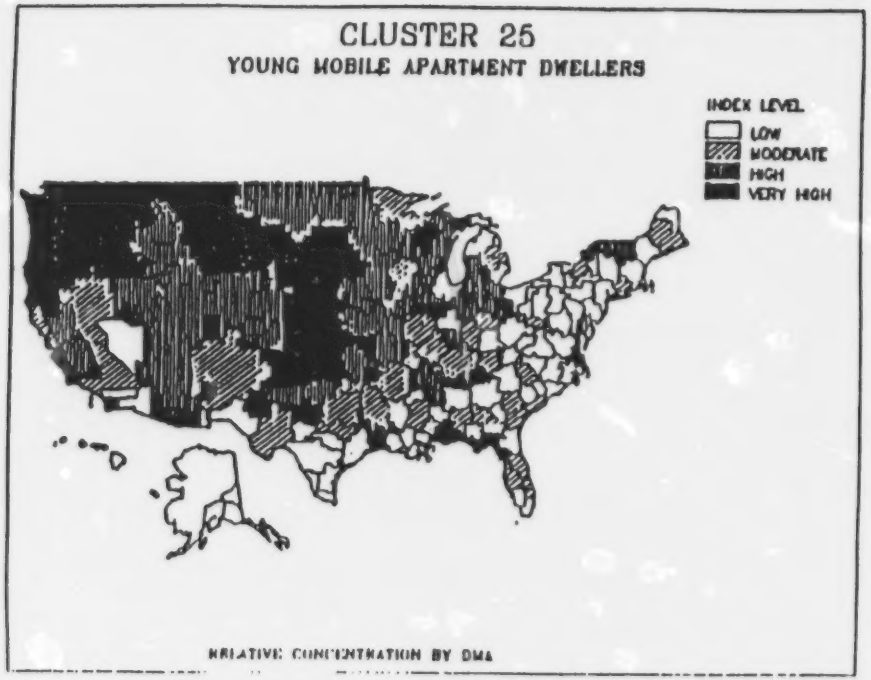
Medical/Healthcare Insurance - Medicare
Money Orders
Non-Interest Bearing Checking Accounts
Home Improvement Loans
Legal Services

LEISURE PURSUITS

Camping
Snow Skiing
Belong to Fraternal Order
Water Skiing
Fishing
Hunting
Public Issue Involvement

SPENDING HABITS

Health & Beauty Aids
Non Filter Cigarettes
Weight Watchers Products
Soft Drinks
Domestic Beers
Snack Candy
Clothing Expenditures
Imported Trucks



QUESTIONNAIRE

TOURISM - MARKET MATCH STUDY - #448

BRITISH COLUMBIA - UNITED STATES MARKET MATCH SURVEY QUESTIONNAIRE

Hello, this is _____, calling from Gilmore Research, a national survey research company. We are conducting a survey (today/this evening) and your household has been selected.

We are interviewing people who have travelled outside the United States during the past three years or who plan to do so in the next two years. Is there anyone like that living in your household, who is also 25 years old or older?

NOTE: TRAVEL FOR BUSINESS OR PLEASURE IS ACCEPTABLE

IF NO, RECORD AND TERMINATE

IF YES, CONTINUE

Is there more than one person like that living in your household?

IF NO, ASK TO SPEAK TO THE PERSON WHO HAS OR IS PLANNING TO TRAVEL OUTSIDE THE US
CONTINUE AT "A"

IF YES, SAY:

Of those who have travelled outside the United States, I need to speak to [RANDOM: oldest/youngest] May I please speak to that person?

IF YES, CONTINUE AT "A"

IF R HESITATES, USE PERSUADERS

IF SELECTED R ABSENT, SCHEDULE CALL-BACK

A. REINTRODUCE IF SELECTED R IS NOT PERSON WHO ANSWERED THE PHONE

My questions will take 10 or 12 minutes, May I go ahead? Thank you.

IF R HESITATES, USE PERSUADERS

IF SELECTED R ABSENT, SCHEDULE CALL-BACK

PERSUADERS

We are not selling anything at all.

The topic of the interview is international travel; what you like to do and where you like to go.

It is very important that we speak to you. Your opinions represent many others and if we cannot interview every member of our sample, the accuracy of our data will be reduced.

This is a very important study, because it will be used to plan tourist activities.

I can't tell you who the sponsor of the study is right now, because it might influence the way you answer some questions. But I would be happy to tell you at the end of the interview.

Everything you say will be kept strictly confidential.

Q1. Have you taken a trip outside the United States, either for business or pleasure, during the past three years, or are you planning such a trip during the next two years?

1. YES | SKIP TO Q3

2. NO
3. DON'T KNOW
4. REFUSED

Q2. ASK IF Q1 EQ 2, 3 OR 4. Is there anyone else in your household, who is 25 or older, who has travelled outside the US during the past three years or is planning to do so during the next three years?

1. YES - ASK TO SPEAK TO THAT PERSON AND X-BACK TO A.

2. NO | SAY: I only need to talk to people
3. DON'T KNOW | who have or are planning to travel
4. REFUSED | outside the US, so those will be
| all my questions. Thank you for
| your time. TERMINATE AND X-BACK

Q3. Thinking of your major vacation travel to any location, what vacation destinations have you traveled to in the last three years? THREE FRAMES

1. CALIFORNIA
2. PACIFIC NORTHWEST (INCLUDING OREGON, WYOMING, IDAHO AND WASHINGTON STATE)
3. ALASKA
4. HAWAII
5. OTHER U.S. (EXCLUDING PREVIOUS CODES)
6. VANCOUVER, B.C.
7. VICTORIA, B.C.
8. OTHER BRITISH COLUMBIA (EXCLUDING VANCOUVER AND VICTORIA)
9. ALBERTA
10. ONTARIO (INCLUDING TORONTO)
11. OTHER CANADA (EXCLUDING B.C./ALBERTA/ONTARIO)
12. EUROPE
13. ASIA
14. AUTSTRALIA/NEW ZEALAND/SOUTH PACIFIC
15. MEXICO/CENTRAL AMERICA/SOUTH AMERICA
16. CARIBBEAN
17. NONE
18. OTHER
19. DON'T KNOW
20. REFUSED
21. NO FURTHER RESPONSE

Q4. And what destinations do you have <u>firm</u> plans to visit during the next two years? THREE FRAMES

1. CALIFORNIA
2. PACIFIC NORTHWEST (INCLUDING OREGON, WYOMING, IDAHO AND WASHINGTON STATE)
3. ALASKA
4. HAWAII
5. OTHER U.S. (EXCLUDING PREVIOUS CODES)
6. VANCOUVER, B.C.
7. VICTORIA, B.C.
8. OTHER BRITISH COLUMBIA (EXCLUDING VANCOUVER AND VICTORIA)
9. ALBERTA
10. ONTARIO (INCLUDING TORONTO)
11. OTHER CANADA (EXCLUDING B.C./ALBERTA/ONTARIO)
12. EUROPE
13. ASIA
14. AUTSTRALIA/NEW ZEALAND/SOUTH PACIFIC
15. MEXICO/CENTRAL AMERICA/SOUTH AMERICA
16. CARIBBEAN
17. NONE
18. OTHER
19. DON'T KNOW
20. REFUSED
21. NO FURTHER RESPONSE

Q4B. Have your travel plans changed in response to the war in the Persion Gulf?

1. YES
2. NO
3. OTHER/DEPENDS
4. DON'T KNOW
5. REFUSED

Q4C. ASK IF Q4B EQ 1. How have your travel plans changed?

1. POSTPONED/CANCELLED TRIP TO MIDEAST
2. POSTPONED/CANCELLED TRIP TO EUROPE
3. POSTPONED/CANCELLED OTHER TRIP OUTSIDE THE US/WILL TRAVEL ONLY IN THE US
4. POSTPONED/CANCELLED AIR TRAVEL/WILL NOT TRAVEL BY AIR
5. OTHER (SPECIFY - ONE FRAME)
6. DON'T KNOW
7. REFUSED

Next, I'd like you to think about a vacation you might take outside your home state. I'm going to read four general types of vacation you might take. Please rate each one on a scale of 1 to 5, where 1 means you would not be interested at all in that type of vacation, and 5 means you would be extremely interested.

First is:

RANDOM

Q5. A city trip, where you could shop, visit museums, enjoy entertainment, dine, attend plays or concerts or just stroll and enjoy the city. (Where would you rate your interest in this type of vacation, on a scale of 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED
8. WLD'NT TRAVEL OUTSIDE HOME STATE | SKIP TO Q43

Q6. An outdoor adventure vacation in a natural area, where you could engage in activities such as camping, hunting, fishing, hiking or rafting. (Where would you rate your interest in this type of vacation, on a scale of 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED
8. WLD'NT TRAVEL OUTSIDE HOME STATE | SKIP TO Q43

Q7. A resort vacation to a resort or a resort area where a wide variety of activities, such as beaches, skiing, golfing, tennis, horseback riding and so on, were available close by or on the premises. (Where would you rate your interest in this type of vacation, on a scale of 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED
8. WLD'NOT TRAVEL OUTSIDE HOME STATE | SKIP TO Q43

Q8. A touring vacation by car, bus, RV or train through areas of scenic beauty, cultural or general interest. (Where would you rate your interest in this type of vacation, on a scale of 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED
8. WLD'NT TRAVEL OUTSIDE HOME STATE | SKIP TO Q43

*** DISPLAY SCREEN OF RESPONSES TO Q5-8.
*** INTERVIEWER: SELECT VACATION TYPE WHICH IS HIGHEST RATED, GIVEN QUOTAS

Next, I'd like to ask you some questions about a [RECOVER FROM DISPLAY SCREEN THE TYPE OF VACATION R FINDS MOST INTERESTING]. Remember that this is a vacation that you would take outside your home state.

Q10. How much per day would you be willing to pay for a [RECOVER VACATION TYPE FROM DISPLAY SCREEN], per person, excluding transportation costs?
FOR TOURING VACATION, DELETE "excluding transportation costs"

_____ DOLLARS (IF RANGE GIVEN, ENTER THE AVERAGE)

9997. OTHER/DEPENDS
9998. DON'T KNOW (SAY: Well, could you just take a guess?)
9999. REFUSED

Q11. Assuming that this vacation took outside the your home state, what is the maximum hours you would be willing to travel get to your destination?

____ HOURS (IF RANGE GIVEN, ENTER THE AVERAGE)

9996. NONE
9997. OTHER/DEPENDS
9998. DON'T KNOW (SAY; Well, could you just take a guess?)
9999. REFUSED

Q11B. ASK IF Q11 NE 9996, 9997, 9998,9999. Does this refer to travel by air or by car?

1. AIR
2. CAR
3. OTHER
4. DON'T KNOW
5. REFUSED

Q12. What would be the best length of vacation, in terms of number of nights away from home? Assume that this is your major vacation during the year.

____ NIGHTS (IF RANGE GIVEN, ENTER THE AVERAGE)

9997. OTHER/DEPENDS
9998. DON'T KNOW (SAY; Well, could you just take a guess?)
9999. REFUSED

Q13. What degree of luxury would you want for this vacation:

1. The most luxurious,
2. First class,
3. Middle range, or
4. Basic accommodation?

5. OTHER/DEPENDS
6. DON'T KNOW
7. REFUSED

Q14. If this were your major vacation during the year, how many people would there be in your travelling party, including yourself?

____ NUMBER (IF RANGE GIVEN, ENTER THE AVERAGE)

9997. OTHER/DEPENDS
9998. DON'T KNOW (SAY: Well, could you just make an estimate?
9999. REFUSED

Next, I'm going to read a list of activities that you might do on a [RECOVER TYPE OF VACATION FROM DISPLAY FRAME]. Using the scale from 1 to 5, please tell me how interested you would be in each one.

(Remember that 1 means that you are not at all interested and 5 means that you are extremely interested.)

*** FOR CITY VACATIONS

RANDOM

Q15. Shopping (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q16. Sightseeing (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q17. Visiting heritage or historic sites. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q18. Cultural activities, like museums, theatre or opera. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q19. Special events or shows. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q20. Visiting gardens. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

END RANDOM

Q21. Is there any other type of vacation activity in particular that would interest you more than any of the ones I have just mentioned? IF YES: What would that be?

ONE FRAME

*** FOR TOURING VACATIONS

RANDOM

Q22. Guided or organized tours. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q23. Tours which stay mainly in cities. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q24. Tours which stay mainly in rural areas. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q25. Tours involving sports activities, like golf, tennis or fishing. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q26. Tours involving outdoor activities, like hiking or nature walks. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

END RANDOM

Q27. Is there any other type of vacation activity in particular that would interest you more than any of the ones I have just mentioned? IF YES: What would that be?

ONE FRAME

*** FOR RESORT VACATIONS

RANDOM

Q28. Marine resorts (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q29. Fishing resorts. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q30. Ski resorts. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q31. Golf resorts. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q32. Guest or dude ranches ranches. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q33. Health resorts. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q34. Wilderness resorts which are not acccessible by automobile. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

END RANDOM

Q35. Is there any other type of vacation activity in particular that would interest you more than any of the ones I have just mentioned? IF YES: What would that be?

ONE FRAME

*** FOR OUTDOOR VACATIONS

RANDOM

Q36. Wildlife viewing. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q37. Coastal cruising or boating. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q38. Hiking. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q39. Whitewater canoeing or kayaking. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q40. River rafting. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

Q41. Fishing. (How interested would you be in this activity, on the scale from 1 to 5?)

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW
7. REFUSED

END RANDOM

Q42. Is there any other type of vacation activity in particular that would interest you more than any of the ones I have just mentioned? IF YES: What would that be?

ONE FRAME

Q42B. Would you prefer a vacation with guided activities, or without a guide?

1. GUIDED
2. SOME OF EACH/DEPENDS
3. UNGUIDED

4. OTHER
5. DON'T KNOW
6. REFUSED

Q43. Next, thinking of the [RECOVER VACATION TYPE FROM DISPLAY FRAME OR IF NO VACATION TYPE IS PREFERRED, SAY: your next major vacation], what are the three most attractive destinations that come to mind which are outside your home state?

ONE FRAME

Q43A. Have you ever heard the slogan "Super Natural" associated with a vacation destination?

1. YES
2. YES WITH MENTION OF BRITISH COLUMBIA
3. NO
4. OTHER
5. DON'T KNOW/NOT SURE/DON'T REMEMBER
6. REFUSED

Q43B. ASK IF Q43A EQ 1, 3-6. Have your ever heard this slogan (Super Natural) associated with British Columbia?

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q44. How much do you know about British Columbia as a destination for <u>any type</u> of vacation?

READ

1. A great deal,
2. A moderate amount,
3. A little, or
4. Nothing at all?

5. OTHER/DEPENDS
6. DON'T KNOW
7. REFUSED

Q45. How many times, if any, have you taken <u>any kind</u> of vacation in <u>British Columbia</u> for one night or longer?

____ NUMBER OF TIMES

9998. DON'T KNOW (ASK: What would be the approximate number of times?)

9999. REFUSED

Q46. On the scale of 1 to 5 (where 1 means not at all interested and 5 means extremely interested), how interested are you in taking a vacation <u>of any kind</u>, lasting one night or longer, in British Columbia?

1. NOT AT ALL INTERESTED
2.
3.
4.
5. EXTREMELY INTERESTED

6. DON'T KNOW | SKIP
7. REFUSED | TO Q48

Q47. ASK IF Q 46 EQ 1-5. Why did you rate your interest in a British Columbia vacation at a [RECOVER SCORE FROM Q47]? PROBE AND CLARIFY

THREE FRAMES

Q47B. Has Canada become a more attractive destination to you, in the light of the war in the Persian Gulf, or not?

1. HAS BECOME MORE ATTRACTIVE
2. HAS NOT BECOME MORE ATTRACTIVE

3. OTHER/DEPENDS
4. DON'T KNOW
5. REFUSED

Q47C. ASK IF Q47B EQ 1 OR 2. What are your major reasons for saying that?

THREE FRAMES

Now for a different type of question. During the past year, please tell me if you have seen or heard any advertising for each of the following places as a vacation destination.

RANDOM

Q48. Hawaii. (Have you seen or heard any advertising for Hawaii as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q49. Australia. (Have you seen or heard any advertising for Australia as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q50. Alaska. (Have you seen or heard any advertising for Alaska as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q51. Canada. (Have you seen or heard any advertising for Canada as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q52. British Columbia. (Have you seen or heard any advertising for British Columbia as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q53. Alberta. (Have you seen or heard any advertising for Alberta as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q54. Ontario. (Have you seen or heard any advertising for Ontario as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

Q55. Colorado. (Have you seen or heard any advertising for Colorado as a vacation destination during the past year?)

1. YES
2. NO
3. OTHER
4. DON'T KNOW/NOT SURE/DON'T REMEMBER
5. REFUSED

END RANDOM

On a scale of 1 to 5, how useful do you find each of the following as a source of information when you are planning a vacation, where 1 means not at all useful and 5 means extremely useful?

RANDOM

Q58. Brochures.
(How useful do you find this source of information, on a scale of 1 to 5, where 1 means not at all useful and 5 means extremely useful?)

1. NOT AT ALL USEFUL
2.
3.
4.
5. EXTREMELY USEFUL

6. DON'T KNOW
7. REFUSED

Q59. Radio and television advertising.
(How useful do you find this source of information, on a scale of 1 to 5, where 1 means not at all useful and 5 means extremely useful?)

1. NOT AT ALL USEFUL
2.
3.
4.
5. EXTREMELY USEFUL

6. DON'T KNOW
7. REFUSED

Q60. Newspaper and magazine articles and advertising.
(How useful do you find this source of information, on a scale of 1 to 5, where 1 means not at all useful and 5 means extremely useful?)

1. NOT AT ALL USEFUL
2.
3.
4.
5. EXTREMELY USEFUL

6. DON'T KNOW
7. REFUSED

Q62. Travel agents or tour operators.
(How useful do you find this source of information, on a scale of 1 to 5, where 1 means not at all useful and 5 means extremely useful?)

1. NOT AT ALL USEFUL
2.
3.
4.
5. EXTREMELY USEFUL

6. DON'T KNOW
7. REFUSED

Q63. Friends or relatives.
(How useful do you find this source of information , on a scale of 1 to 5, where 1 means not at all useful and 5 means extremely useful?)

1. NOT AT ALL USEFUL
2.
3.
4.
5. EXTREMELY USEFUL

6. DON'T KNOW
7. REFUSED

END RANDOM

Q64. Finally, just a few questions about yourself to help us classify our data. First, who makes the major travel decisions in your household:

1. The male head of household,
2. The female head of household,
3. Both together, or
4. Someone else?

5. OTHER/DEPENDS
6. DON'T KNOW
7. REFUSED

Q65. Into which age category may I place you?

1. Under 25,
2. 25 to 34,
3. 35 to 44,
4. 45 to 54,
5. 55 to 64, or
6. 65 and over.

Q66. What is your full nine-digit zip code?

IF R DOES NOT KNOW ALL NINE DIGITS, CODE FIRST FIVE DIGITS TO THE LEFT OF THE DASH.

_ _ _ _ _ - _ _ _ _ ENTER CODE

99998. DON'T KNOW
99999. REFUSED

Q67. ASK ONLY IF R DID NOT SUPPLY FULL NINE-DIGIT ZIP CODE: And what is your street address?

ONE FRAME

NOTE: PLEASE BE CAREFUL. SPELLING IS EXTREMELY IMPORTANT. ALSO, BE SURE TO RECORD THINGS LIKE "WEST" OR "NE" AND TO GET A HOUSE NUMBER, ROUNDED TO THE NEAREST HUNDRED IF NECESSARY. DO NOT ACCEPT INTERSECTIONS UNLESS YOU CANNOT GET A HOUSE NUMBER

Q68. So that my supervisor can verify my work, may I have your first name or initial?

ONE FRAME

Those are all my questions. Thank you very much for your time.

Q69. RECORD GENDER

1. MALE
2. FEMALE

Q70. RECORD LENGTH OF INTERVIEW

Q71. RECORD CITY

1. SEATTLE
2. PORTLAND
3. SAN FRANCISCO
4. LOS ANGELES
5. DALLAS
6. CHICAGO

Q72. RECORD DATE

Q73. RECORD PHONE NUMBER

Q74. INTERVIEWER ID